DOCUMENT RESUME

ED 336 533 CE 058 877

AUTHOR Woloszyk, Carl A.
TITLE A Study To Determine the Job Tasks and Levels of Employment for General Marketing Occupations Using DACUM Occupational Analysis. Final Report.
INSTITUTION Western Michigan Univ., Kalamazoo.
PUB DATE 3 Jun 91
NOTE 110p.
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01/PC05 Plus Postage.
DESCRIPTORS Behavioral Objectives; *Competence; *Competency Based Education; *Course Content; *Curriculum Development; Job Skills; *Marketing; Program Improvement; Secondary Education; *State Curriculum Guides; Vocational Education
IDENTIFIERS *DACUM Process; Michigan

ABSTRACT

During the 1990-91 school year, a study was conducted to determine a validated list of competencies (concepts and tasks) for use in curriculum development efforts for general marketing programs in Michigan. DACUM (Developing a Curriculum) was the occupational analysis procedure used to identify the competencies, job tasks, level of difficulty, and levels of employment for general marketing programs. Using a six-step research process including a literature review, a management panel, a cluster panel, analysis and synthesis, a validation panel, and database management, the study (1) developed a validated list of competency statements for general marketing programs; (2) defined major instructional areas by sequence and level of difficulty; (3) identified a career hierarchy and cluster chart for general marketing; and (4) assigned competencies to one of five prebaccalaureate levels of employment (entry, career-sustaining, marketing specialist, marketing supervisor, and manager-entrepreneur) within marketing occupations. The identified competencies provided the framework used to develop a curriculum guide for secondary marketing education programs in Michigan. (An eight-page project report is followed by a cluster career chart, competency list, and appendices containing the DACUM panel members; invitational letters and enclosures; validation panel agenda, handouts, and minutes; and follow-up letter and panel participation records.) (KC)

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A Study to Determine the Job Tasks and Levels of Employment for General Marketing Occupations Using DACUM Occupational Analysis

Final Report
June 3, 1991

Reseacher

Carl A. Woloszyk, Ph.D.
Associate Professor
Western Michigan University
Department of Consumer Resources and Technology

U.S. DEPARTMENT OF EDUCATION
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A Study to Determine the Job Tasks and Levels of Employment for General Marketing Occupations Using DACUM Occupational Analysis

Carl A. Woloszyk, Ph.D.
Department of Consumer Resources and Technology
Western Michigan University

Abstract

During the 1990-91 school year, a study was conducted to determine a validated list of competencies (concepts and tasks) for use in curriculum development efforts for general marketing programs by the Michigan Department of Education, Vocational-Technical Education Service and the Marketing Education Resource Center (MarkED). MarkED is a non-profit research and development agency affiliated with the Ohio State University and operated by 36 state education departments in a consortium arrangement.

DACUM or "Developing a Curriculum" was the occupational analysis procedure used to identify the competencies, job tasks, level of difficulty and levels of employment for general marketing programs. DACUM analysis provides a systematic approach to determining the competencies that must be performed by persons in a given job or occupational area through the use of business/industry panels. Using a six-step research process including a literature review, a management panel, a cluster panel, analysis and synthesis, a validation panel and data base management, the study:

1) developed a validated list of competency statements for general marketing programs,

2) defined major instructional areas by sequence and level of difficulty,

3) identified a career hierarchy and cluster chart for general marketing, and

4) assigned competencies to one of five pre-baccalaureate levels of employment (entry, career-sustaining, marketing specialist, marketing supervisor, and manager-entrepreneur) within marketing occupations.

The identified competencies provided the framework used to develop a curriculum guide for secondary marketing education programs in Michigan.

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Statement of the Problem

The mission of marketing education at pre-baccalaureate levels is to develop competent workers in and for the major occupational areas within marketing, assist in the improvement of marketing techniques, and build understandings of the wide range of social and economic responsibilities that accompany the right to engage in marketing in a free enterprise system. [1]

Marketing education programs throughout the nation are being structured to match the wide diversity within the field of marketing. Marketing programs must deal with the principles, concepts, attitudes, and skills necessary to prepare students to work in retail, wholesale, service, and manufacturing environments, from the first job of the new employee to technical and managerial positions. Competencies ranging from point-of-sale operations to planning, budgeting, and supervising are all part of a marketing education curriculum. Competencies are defined as the required job tasks, concepts, and attitudes to successfully perform a job in marketing.

The problem under study was the identification through occupational analysis of relevant, up-to-date, competencies for curriculum development in general marketing programs.

General marketing is defined as an instructional program that prepares individuals to perform marketing and management functions and tasks that can be applied broadly to any marketing environment. Principles, practices, and procedures are taught, but without particular identification with a specific kind of business, product, or service.[2]

DACUM or "Developing a Curriculum" was the occupational analysis procedure used to identify competencies, job tasks, and levels of employment for general marketing occupations. DACUM analysis has been proven to be a very effective method of quickly determining, at relatively low cost, the competencies that must be performed by persons employed in a given job or occupational area.

DACUM has been successfully used to analyze occupations at the professional, technical, skilled, and semi-skilled levels. DACUM operates on the following three premises:

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[1] Michigan State Board of Education, Michigan Department of Education, Vocational-Technical Education Service. Marketing Education Cluster Guide May 1991, page 3.

[2] Office of Educational Research and Improvement, A Classification of Instructional Programs, U.S. Department of Education, 1987.

1. expert workers are better able to describe/define their job than anyone else,

2. any job can be successfully and sufficiently described in terms of the tasks that successful workers in that occupation perform, and;

3. all tasks have direct implications for the knowledge and attitudes that workers must have in order to perform the tasks correctly[3]

Through the use of business/industry panels consisting of expert workers and supervisors, the DACUM process results in the identification of duties and job task statements. These duty and job task statements outline what a successful worker in a particular job or cluster of related jobs must be able to do.

Panel members are recruited directly from business, industry, or the professions. The panel members work under the guidance of a facillitator to verify the task lists, assign tasks to levels of employment, and establish a hierarchy of jobs within the occupational area. Modificd small-group brainstorming techniques are used to obtain the collective expertise and consensus of the panel.

Background for the Study

Marketing education is a vocationally oriented program designed to meet the needs of persons who have entered or are preparing to enter an occupation or entrepreneurial venture requiring competencies in marketing. Marketing occupations are chosen by persons engaged primarily in the marketing of goods, services, or ideas at all employment levels.

Employment in marketing can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. The occupational requirements for each level of employment guide the identification of instructional objectives and learning activities. The marketing activities which take place at each level of employment are classified in the broad categories of marketing functions, but the activities vary in complexity from level to level. Pre-baccalaureate

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[3] The National Center for Research in Vocational Education, Ohio State University. DACUM Handbook, 1985, page 1

marketing education is directed to instruction at the first five levels of marketing employment.

Entry-level marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing education, experience or commitment to a marketing career. Competencies required to secure and hold such a job address good personal appeareance, general business behavior and basic skills such as math and communications. Representative job titles at this level include bagger, busser, clerk, marker, merchandise clerk, order-taker, or server.

Career-sustaining level marketing occupations involve performing more complex duties, using routine decision-making skills and limited control of one's own working environment. Individuals in a career-sustaining level job should have a basic understanding of the marketing concept and its foundations and have indicated an initial interest in marketing as a potential career. Representative job titles at this level of employment include cashier, crew leader, customer service representative, head cashier, lead clerk, sales representative, salesperson, server, or stockperson.

Marketing specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function. Individuals in a marketing specialist occupation need to have a thorough understanding of the marketing concept and its functions. Representative job titles at this level include assistant buyer, department head, department supervisor, manager trainee, manufacturer's representative, marketing research assistant, or professional salesperson.

Marketing supervisor occupations involve a high level of competence in decison-making and leadership. Individuals in this role are responsible for planning, coordinating, and supervising marketing related activities. Representative job titles include assistant manager, department manager, department supervisor, district manager, marketing manager, merchandising manager, operations manager, or sales manager.

Manager-entrepreneur implies competence in a variety of tasks related to owning one's own business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a unit within an organization or a small business enterprise. A comprehensive understanding of marketing and management competencies is required to function in this role. Representative job titles include director,

marketing manager, merchandise manager, owner, store manager, marketing vice-president, or sales vice-president.

There are higher levels of employment in marketing, which involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience and a thorough comprehension of the theories of marketing and their application to corporate activity.[4]

Purposes for the study

The purposes of this study were to develop the following:

1. a job task listing for general marketing occupations
2. a job task listing by sequence and level of difficulty
3. a job task listing by levels of employment within general marketing occupations
4. a marketing education job hierarchy and career cluster chart for general marketing occupations

Methodology

As indicated in the **Statement of the Problem** section of this final report a DACUM analysis was used to validate the tasks, sequence tasks by difficulty of instruction, assign tasks to the appropriate level of employment and develop a hierarchy of jobs within general marketing occupations.

The research process involved with this study consisted of 6 distinct steps:

Step 1: Literature review

Step 2: Management Panel

Step 3: Cluster Panel

Step 4: Analysis and Synthesis

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[4] National Council of Marketing Education, National Curriculum Framework and Core Competencies, 1984.

Step 5: Validation Panel

Step 6: Data Base Management

The above research procedure is used by the Marketing Education Resource Center, Inc. (MarkED). MarkED is a non-profit research and development agency affiliated with the Ohio State University and operated by 36 state education departments in a consortium arrangement.

Established in the early 1970's MarkED's mission is to develop and disseminate systematic approaches for planning, directing, and evaluating curricula for marketing-related oocupations. The mission is addressed through four broad goals:

1. to provide professional development for marketing instructors (high school and community/technical colleges)

2. to develop valid curriculum and instructional materials for high school, post-secondary and adult educators using sound , research-based models

3. to provide an information-management service supporting instructors' efforts to remain current in marketing and in education for marketing

4. to maintain an ongoing research program to support valid, quality instruction in marketing

MarkED uses a qualitative approach to occupational research, based on well-documented DACUM procedures. MarkED's process incorporates a three-stage progression of panels for duty identification, competency identification and validation.

The MarkED Resource Center performed the initial work with Steps 1-4 in the above research process. This study further refined Steps 1-4 and completed Steps 5-6. An initial literature review (Step1) was completed by MarkED and the researcher to 1) provide an industry overview, 2) identify technical terms/definitions and 3) identify research/task listings.

MarkED then conducted a management panel and cluster panel review in Columbus, Ohio during 1990. The MarkED management panel review (Step 2) was a one-half day meeting conducted to1) refine working definitions and

scope of general marketing, 2) identify major topics and duties for general marketing, and; 3) identify workers to serve on subsequent "cluster" panels.

The cluster panel review (Step 3) was a one-day meeting of expert workers and supervisors conducted to1) validate duty areas presented by the management panel, 2) identify competencies performed by workers, and 3) review and refine task statements generated by the cluster panel.

After analysis and review (Step 4) of the literature, management, and cluster panel meetings, a list of competencies was supplied to the researcher by MarkED for further validation.

The researcher conducted a one-day validation panel review (Step 5) on September 5, 1990 with 10 expert workers and supervisors. The purpose of the validation panel review was to 1) validate the task list provided by MarkED, 2) verify tasks in terms of level of task, 3) sequence each task and concept by level of difficulty, and 4) identify a career hierarchy and representative job titles within the occupational area of general marketing.

Validation panel members had to meet the following criteria for selection to the panel: 1) be an owner or supervisor in a marketing occupation, 2) be a competent and active professional, 3) be employed in the industry for at least 5 years, and 4) be willing to devote time to the validation panel meeting and subsequent follow-up and review activities. In addition, members on the validation panel had to be representative of the retail, wholesale, service, manufacturing, and small business sectors within the field of marketing.

The researcher in conjunction with the vocational consultant for marketing education in the Michigan Department of Education made the final selection of the members and confirmed by telephone their willingness to participate in the study. A complete listing of the panel members names, firms, position and occcupational area, which they represented are found in Appendix A.

After the validation panel members were identified and confirmation received regarding their willingness to participate in the study, an invitational letter was sent to them. A one-day validation panel meeting was held on September 5, 1990 at the Kellogg Center on the campus of Michigan State University in East Lansing, Michigan.

Along with the letter the following enclosures were sent to the members in advance of the meeting:

1. MSU campus map
2. Overview of Marketing Education Validation Panel Process
3. Marketing Education Resource Center, Inc. Description
4. Marketing Education in Michigan

The invitational letter and accompanying enclosures are found in Appendix B.

An agenda was developed for the meeting and handout materials were distributed to the members. Handouts included the following:

1. Find Someone Who... (Introductory activity)
2. What is CBE? (Competency Based Education)
3. Characteristics of CBVE (Competency Based Vocational Education)
4. Comparison Between Traditional and Competency Based Education
5. MarkED's Research Process
6. General Marketing Validation Panel
7. Job Titles/Descriptions
8. Foundations/Functions of Marketing
9. Levels of Employment in Marketing
10. General Marketing Master List of Competencies

Validation panels members were asked to identify representative job titles for each level of employment, review each task for wording and level of difficulty, and identify each task at the appropriate level of employment in marketing. During the validation process an assistant recorded minutes, comments and the general proceedings.

The agenda for the meeting, handouts, and the minutes from the validation panel meeting are shown in Appendix C.

After the meeting the researcher reviewed the task statements, clarified several tasks and included additional tasks, which were suggested by the panel. A follow-up letter was sent to each validation panel member asking for corrections and/or changes. A letter of participation was returned by each panel member in October of 1990 indicating their agreement related to the concepts and job tasks, which were developed by the entire panel. The follow-up letter and individual participation records are shown in Appendix D.

After subsequent follow-up review by the validation members, a final list of representative job titles and job tasks, sequenced by level of difficulty and by level of employment was prepared.

Subsequent work and data base management (Step 6) was done by the researcher in conjunction with a cluster guide development team under the leadership of Mr. Tom Benton, vocational educational consultant for marketing education, in the Michigan Department of Education, Vocational-Technical Education Service. The job task statements developed and validated by this study formed the basis for the Marketing Education Cluster Guide published by the Michigan State Board of Education in 1991.

Results

The information obtained by using the DACUM process provided the researcher with the means to systematically analyze job tasks and concepts required by workers in general marketing occupations. In addition, the identified competencies provided the framework used to develop a curriculum cluster guide for marketing education programs in Michigan.

The finalized Marketing Education Cluster Career Chart (including representative job titles), Job Task Listing, (sequenced by level of difficulty and by level of employment) are found on the following pages.

Concluding Remarks

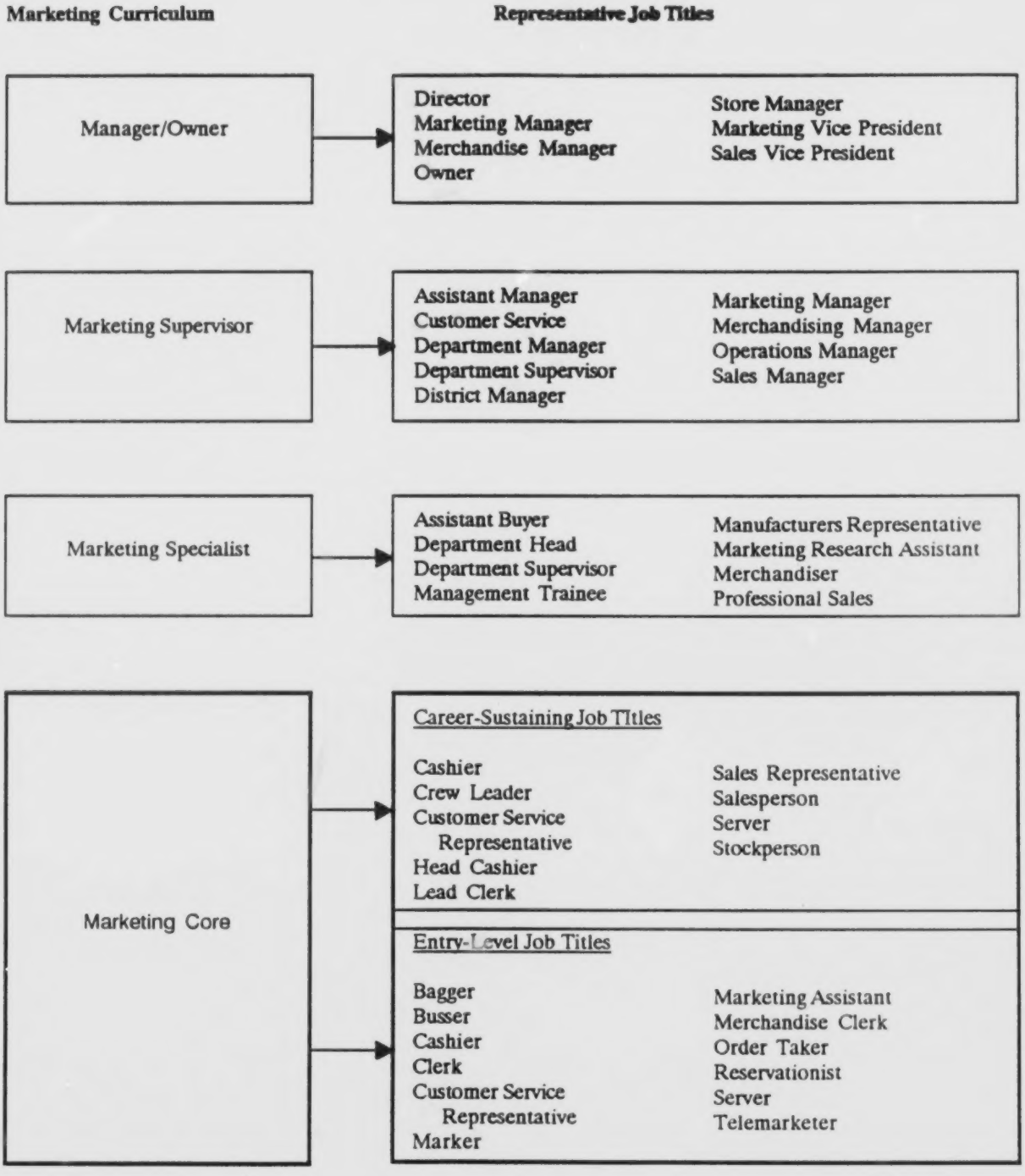
The research results provided the framework for the development of a Marketing Education Cluster Guide by the Michigan State Board of Education, Michigan Department of Education, Vocational-Technical Education Service, Lansing, MI 1991. The Marketing Education Cluster Guide represents the competencies (skill and concepts) essential for marketing education curriculum in state approved and funded secondary marketing education programs throughout the state. The Marketing Education Cluster Guide is available from the Michigan Career and Vocational Education Resource Center 133 Erickson Hall, Michigan State University, East Lansing, Michigan 49924-1034 (517) 353-4397.

The results of this study and a copy of the Marketing Education Cluster Guide were sent to MarkED for their use in further research and curriculum development efforts. The results of the study will also earn Michigan a MarkED membership credit to be applied to the state consortium account.

The identification of validated competencies for general marketing will provide for future curriculum and product development by the Marketing Education Resource Center (MarkED) on a nationwide basis. Through its publications, workshops, and training programs, MarkED reaches 12,000-

15,000 instructors, who work with an estimated 750,000 students annually in all 50 states.

MARKETING EDUCATION CLUSTER CAREER CHART



Completion of each level prepares students to obtain positions listed as representative job titles in one or more of the following occupational areas: Apparel/Accessories Marketing, Entrepreneurship (Small Business Management), Entrepreneurship (Small Business Ownership), Finance Services Marketing, Food Marketing, General Merchandising/ Retailing, Hospitality and Recreation Marketing, Sales, Transportation and Travel Marketing, and Vehicle/Petroleum Marketing.

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
ECONOMIC FOUNDATIONS OF MARKETING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR

Explain the concept of profit
Explain the concept of competition
Explain the concept of productivity

Explain the concept of economic goods and services
Explain the concept of economic resources
Explain the concept of supply and demand
Explain the concept of private enterprise
Explain the concept of price
Explain the concept of risk
Explain the concept of specialization/division of labor
Explain the concept of organized labor

Explain the concept of economic activities
Explain the concept of utility
Explain the types of economic systems
Explain the relationship of government and business
Explain the concept of gross national product
Explain the concept of business cycles
Explain the nature of international trade

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
HUMAN RESOURCE FOUNDATIONS (MATHEMATICS)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Solve addition problems				
Solve subtraction problems				
Solve multiplication problems				
Solve division problems				
Solve mathematical problems involving fractions				
Solve mathematical problems involving percentages				
Calculate tax, discounts, and miscellaneous charges for purchases				
	Read charts and graphs			
		Solve first-degree algebraic equations		
		Calculate net sales		
		Interpret profit and loss statements		

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
HUMAN RESOURCE FOUNDATIONS (COMMUNICATIONS)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Use proper grammar and vocabulary	Explain the nature of effective communications	Write business letters		
Address people properly	Explain the nature of effective verbal communications	Prepare complex written reports		
Use telephone in businesslike manner	Explain the nature of written communications	Conduct staff meetings		
Prepare simple written reports	Explain the nature of staff communications			
Listen to and follow directions	Give directions for completing job tasks			
Read inter-departmental/company communications	Develop listening skills			
Read employee publications				

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
HUMAN RESOURCE FOUNDATIONS (HUMAN RELATIONS)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Maintain appropriate personal appearance				
Maintain positive attitude				
Demonstrate interest and enthusiasm				
Demonstrate responsible behavior				
Demonstrate honesty and integrity				
Demonstrate ethical behavior				
Demonstrate orderly and systematic behavior				
Demonstrate initiative				
Demonstrate self-control				
Demonstrate appropriate creativity				
Explain personal strengths and weaknesses				
Adjust to change				
Set personal goals				
Use time-management principles				
Explain the nature of positive customer/client relations				
Handle customer inquiries				
Direct customer/client to other locations				
Explain management's role in customer relations				
Show empathy for others				
Explain procedures/options for handling difficult customers				
	Develop personality traits important to business			
	Explain the concept of self-esteem			
	Use feedback for personal growth			
	Use appropriate assertiveness			
	Explain procedures/options for handling difficult customers			
	Interpret business policies to customers/clients			
	Handle customer/client complaints			
	Foster positive working relations			

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
HUMAN RESOURCE FOUNDATIONS (CAREER DEVELOPMENT)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Conduct a job search Prepare a resume Write a letter of application Complete a job application Interview for a job	Explain the use of trade journals/periodicals Explain the role of professional/trade organizations Explain the nature of trade shows	Explain the role of dealer/franchise meetings		

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
HUMAN RESOURCE FOUNDATIONS (MANAGEMENT)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature of remedial action				
	Plan and organize work			
		Schedule employees		
		Calculate personnel turnover rate		
		Explain ways to develop a positive working environment		
		Explain ways to build employee morale		
		Explain the concept of staff motivation		
		Explain relationship of communications with employee motivation		
		Explain the concept of employee participation in decision making		
		Explain the role of leadership in business		
		Explain techniques for recruiting new employees		
		Interview job applicants		
		Orient new employees		
		Explain the role of training and human resource development		
		Conduct training class/program		
		Explain the nature of wage and benefit programs		
		Develop employee incentive program		
			Maintain personnel records	
			Develop personnel organizational plan	
			Develop job classifications	
			Determine hiring needs	
			Handle employee complaints and grievances	
			Use evaluation data for staffing decisions	
			Explain techniques for recruiting mgt.personnel	
			Select new employees	
			Orient new employees (management's role)	
			Explain the nature of mgt./supervisory training	
			Evaluate employees	
			Approve remedial action	
			Approve employee incentive program	
				Establish personnel policies

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
MARKETING AND BUSINESS FUNDAMENTALS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the concept of management				
Explain the concept of production				
Explain the relationship of business and society				
	Explain the functions of business			
	Explain marketing and its importance			
	Explain the concept of accounting/finance			
	Explain the concept of administration			
	Explain the types of business ownership			
	Explain marketing functions and related activities			
		Explain the concept of marketing strategies		
		Explain the concept of market and market identification		
		Explain the nature of channels of distribution		

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
MARKETING AND BUSINESS FUNDAMENTALS (MANAGEMENT)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR

Explain employee role in expense control

Explain the nature of overhead/operating costs
Develop expense-control plans
Explain the nature of operating budgets
Develop sales-support budget
Use budgets to control operations
Explain external planning considerations
Explain legal considerations for company operation
Explain types of records needed for business operations

Analyze operating results in relation to budget/industry
Develop company objectives (for management unit)
Establish operating policies

Develop company-wide budget

FOUNDATIONS FOR MARKETING

MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING

MARKETING AND BUSINESS FUNDAMENTALS (OPERATIONS)

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR

Explain the nature and scope of operations
Handle company equipment properly
Operate Business Machines (i.e. calculator, keyboard, etc.)
Explain functions of store maintenance

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
MARKETING FUNCTIONS AND APPLICATIONS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of distribution				
Explain the receiving process				
	Explain storing considerations			
	Organize stock counts			
		Select appropriate storage equipment		
		Explain the nature of inventory control systems		
		Explain types of unit inventory control systems		
		Calculate inventory shrinkage		
		Maintain unit inventory control systems		
		Explain the nature of dollar inventory control systems		
		Maintain dollar inventory control systems		
		Explain the nature of channel strategies		
			Select appropriate channels	

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
FINANCING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR

Facilitate consumer/individual credit applications

Explain the nature and scope of financing
Explain the purposes and importance of credit
Facilitate business/group credit applications
Explain the purpose and importance of obtaining credit (business)

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
MARKETING-INFORMATION MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of marketing-information management				
Explain the nature of marketing-research (what it is, process,)				
Select sources of information (primary vs. secondary, defined, so reasons for selecting one)				
Select research method for gathering data (survey, experimental, personal interview, observational, ...)				
Develop simple questionnaire				
Prepare sampling plan (sampling unit, size, procedure)				
Explain the nature of demand analysis				
Explain the nature of sales forecasts				
Interpret trends in sales volumes				
Interpret market demand				
Determine sales potential				
Forecast sales				
	Interpret factors affecting market share			
	Develop marketing plan			

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
PRICING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Explain the nature and scope of pricing Explain factors affecting selling price Explain the psychological effects of pricing Calculate break-even points Explain the nature of company pricing policies/strategies Explain legal considerations of pricing Adjust prices		
			Establish selling price (management) Establish price Establish pricing structure	

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
PRODUCT/SERVICE PLANNING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of product/service planning Explain applicable grades and standards Explain warranties and guarantees Explain the role of special customer services	Explain the nature of product-life cycles Explain critical aspects of business image Explain the role of branding Explain consumer protection provisions of appropriate agencies Explain the nature of the product-development process Explain the nature of product positioning Explain the nature of packaging Explain the concept of product mix	Plan product mix		

FOUNDATIONS FOR MARKETING

MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING

PROMOTION

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the types of media				
	Explain the role of promotion			
	Explain the types of promotion			
	Explain the nature of company participation in community activities			
	Explain the use of catalogs as a promotional tool			
	Calculate media costs			
		Explain the concept of promotional mix		
		Calculate media costs		
		Select promotional media		
		Contract for print advertising		
		Contract for broadcast advertising		
		Promote through publicity		
		Write news release		
		Plan use of specialty advertising, premiums, etc.		
		Explain the nature of a promotional program		
		Use past advertisements for promotional planning		
		Coordinate promotional activities		
		Prepare promotional budget		
		Prepare advertising budget		
		Seek cooperative advertising/promotional materials		
		Use advertising agency		
			Evaluate media/advertising effectiveness	
			Select products for promotion	
			Develop a comprehensive, company-wide promotional program	
			Prepare advertising budget	
			Select an advertising agency	
			Determine/approve promotional policy/stragegy	
				Approve news release
				Approve advertising budget
				Approve a comprehensive, company-wide promotional program

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
PURCHASING/BUYING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of buying/purchasing Order merchandise				
	Explain company buying/purchasing policies Evaluate the nature of buying/purchasing process Determine what to buy Determine quantities to buy Determine when to buy Choose vendors/resources Negotiate purchasing contract Analyze/Select appropriate products Calculate merchandising-related discounts Determine final cost of product to company Schedule regular products deliveries Authorize payments for merchandise Explain the nature of purchasing budgets Plan stock Plan reductions Plan purchases			
		Analyze proposed purchases Prepare/Review purchasing budgets		

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
RISK MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain routine security precautions Use fire and safety equipment Use safety precautions Explain procedures for handling accidents		Explain the types of risk Explain risk management methods Develop emergency measures and plans		

FOUNDATIONS FOR MARKETING
MICHIGAN VALIDATION PANEL FOR GENERAL MARKETING
SELLING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the purpose and importance of selling				
Explain company selling policies				
Open the sales presentation				
Question/Probe for information				
Suggest product substitution				
Demonstrate product				
Close the sale				
Use suggestion selling				
Process telephone orders				
	Address needs of individual personalities (client)			
	Use buying motives as basis of sales presentation			
	Facilitate customer buying decisions			
	Explain key factors in building a clientele			
	Explain the selling process			
	Question/Probe for information (advanced)			
	Use feature/benefit selling			
	Handle customer/client objections			
	Explain follow-up techniques			
	Maintain/use customer/prospect list			
	Obtain product information from sources on/with the item			
	Obtain product information from appropriate individuals/mgt.			
	Use company promotional material for selling information			
	Explain sales quotas			
		Explain services and terms being advertised by competitors		
		Prepare sales report		
		Explain the nature of telemarketing		
			Organize sales territories	
			Explain the nature of sales training	
			Develop sales-incentive programs	

Appendix A

Members on DACUM Panel

Member	Firm	Position	Occupational Area
1. Shawn Hearn	K Mart	Asst. Director, Employment & Training	General Mktg/Retail
2. Gladys Solokis	7 Eleven	Franchisee/Owner	Small Business/ Retail
3. Vivienne Burke	Kroger	Administative Support	Food Marketing/ Retail
4. Stephanie Giguere	Bill Knapp's	Education & Training Specialist	Food Service Mktg /Service
5. Dee Smith	Small Business Development Center	Director	Entrepreneurship /Service
6. Joel TePastte	Sysco-Frost Pack	Senior V-P	Wholesaling
7. John Stevenson	Air Flite Industries	Owner/Pres	Manufacturing
8. Dave Nesman	Meijer's	Employ. Manager	G. Merchandising /Retail
9. Bruce Taylor	Taylor Lumber	Owner	Small Business Owner/Retail
10. John Jorgenson	Marriott Hotels	Manager	Hotel and Motel/Service

Appendix B

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

August 6, 1990

Mr. Dee Smith, Director
43-Small Business Development Center
Room 129B Old Central Building
419 North Capitol Avenue
Post Office Box 40010
Lansing, Michigan 48901-7210

Dear Mr. Smith:

Thank you for agreeing to assist us in our curriculum development efforts for Marketing Education. We are committed to the belief that an up-to-date relevant marketing education program must meet the needs of students as they graduate and move into the workforce. The success of such programs relies heavily on the strong guidance and support of business leaders such as yourself.

As we discussed, you will be a member of a panel of marketing professionals charged with the responsibility of reviewing and validating key job tasks performed by marketing employees.

We look forward to meeting with you on September 5, 1990. Our meeting will be at the Kellogg Center, Harrison Road, or Michigan State University's campus at 9:30 a.m., with a continental breakfast at 9:00 a.m. We will conclude no later than 3:00 p.m. It is essential that you plan to participate in the entire session.

Sincerely,

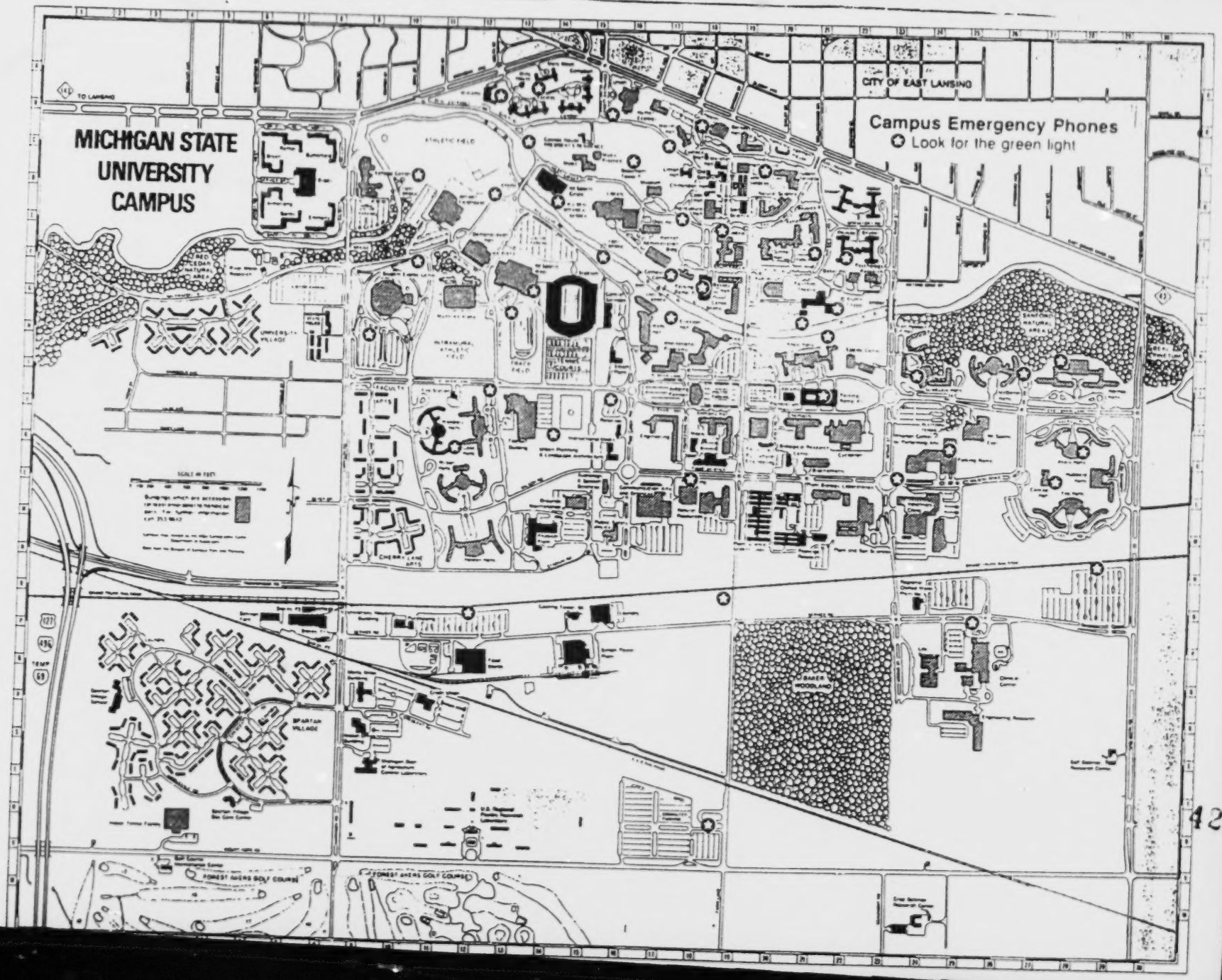
Carl Woloszyk
Associate Professor
Project Director

and

Tom Benton

Tom Benton, Consultant
Marketing Education
Michigan Department of Eduation
Panel Facilitator

Enclosures


MICHIGAN STATE
UNIVERSITY
CAMPUS
CITY OF EAST LANSING
Campus Emergency Phones
Look for the green light

OVERVIEW OF MARKETING EDUCATION
VALIDATION PANEL PROCESS

prepared by Tom Benton, Marketing Education
Michigan Department of Education

What is a validation panel?

Validation panels consist of 10 to 15 expert workers and/or supervisors from several geographic locations representing a cross section of marketing businesses.

What is the purpose of a validation panel?

The purpose is to confirm or verify competency statements previously identified through occupational research. MarkED (the national marketing education curriculum consortium) uses a qualitative approach to occupational research. The process incorporated a three-stage progression of panels for: 1) duty identification; 2) competency identification; and, 3) validation.

Why use a panel to verify competencies?

The use of industry panels promotes idea sharing and probing of thoughts, which are not obtained through isolated administration of questionnaires. We also hope that dialogue will result in a projection of industry needs and employment opportunities as opposed to a summary of current needs and status.

What are the specific responsibilities of the panel?

Your responsibility will be to validate and sequence task lists for general marketing, and then to verify the "level" of the task, frequency performed, and criticalness to job.

What will I have to do before the meeting?

It is not necessary for you to engage in advance preparation for the meeting. We will use a structured approach in order to obtain the collective expertise and consensus of the committee.

(over)

Marketing Education Resource Center, Inc.

The Marketing Education Resource Center, Inc. (or MarkED) is a non-profit (501(c)(3)) research and development agency operated by thirty-three state education departments in a "consortium" arrangements. The agency is affiliated with The Ohio State University through the College of Education. It is primarily self-supporting, with approximately 85 percent of its operating budget derived from the cost-recovery sale of curriculum and instructional materials. The remaining income streams are from consortium membership fees, consulting, and professional development conferences.

Established in the early 1970's, MarkED's mission is to develop and disseminate systematic approaches for planning, organizing, directing, and evaluating curricula for marketing-related occupations. The mission is addressed through four broad goals:

1) to provide professional development for marketing instructors (high school and community/technical colleges)

2) to develop valid curriculum and instructional materials for high school, postsecondary, and adult educators using sound, research-based models.

3) to provide an information-management service supporting instructors' efforts to remain current in marketing and in education for marketing.

4) to maintain an ongoing research program to support valid, quality instruction in marketing.

Over the past several years, MarkED has assumed a leadership role in efforts to effect improved curriculum and instruction in local marketing programs. Representatives of its 33 "member" states and other recognized national leaders meet annually to provide guidance and direction for the MarkED staff. An elected Board establishes policy and monitors operation on behalf of the Consortium. A staff of 16 is responsible for execution of the Board's annual program of work.

MARKETING EDUCATION IN MICHIGAN

Marketing Education is an instructional program offered in a variety of settings, including high schools, area centers, and community colleges. It is known as Distributive Education (DE), Retailing, Co-op, and DECA. The proper label is Marketing Education, but many schools may still refer to the program by the archaic DE or Retailing titles.

DECA is a youth organization that provides leadership, recognition, and competitive activities and opportunities for marketing students. It is generally viewed as an integral part of the total marketing program.

Current high school marketing enrollment is 15,000 students in 240 high schools and area centers. DECA enrollment is 4,050 in 125 high schools and area centers.

The mission of Marketing Education is: 1) to develop competent workers in and for the major occupational areas within marketing; 2) to assist in the improvement of marketing techniques; and 3) to build understandings of the wide range of social and economic responsibilities which accompany the right to engage in marketing businesses in a free enterprise system.

The discipline of marketing provides the content base for instruction. Marketing programs serve a wide range of training needs, from basic entry level competencies (e.g. retail cashiers) to those focusing on operational management and entrepreneurial development.

Frequently marketing education students participate in cooperative education work experiences, working part-time in a marketing business under the joint supervision of the businesses' supervisor and teacher/coordinator. Other programs utilize a school laboratory or store to provide a "simulated" work experience.

Marketing Education programs are taught by certified teachers who are vocationally certified in marketing education (e.g. they have completed at least a minor in marketing courses in college and have been employed for at least two years in a marketing occupation).

GENERAL MARKETING VALIDATION PANEL
WESTERN MICHIGAN UNIVERSITY
MICHIGAN DEPARTMENT OF EDUCATION

September 5, 1990
Kellogg Center
Michigan State University, Room 101

9:00 - 9:30	Coffee	
9:30 - 9:40	Welcome/Introductions	T.Benton, VTES
9:40 - 9:45	Who's Who	C.Woloszyk, WMU
9:45 - 10:00	Purpose/Importance of Panel -Competency-based Education -Marketing Education Framework -Forum vs. Questionnaire	
10:00 - 10:10	Procedure -MarkED Research Process -Operational Guidelines	T.Benton
10:10 - 10:30	Levels of Employment -Representative Job Titles identified	Panel Members (large group)
10:30 - 11:00	Start Validation -By functions/foundations -Review wording and sequence -Identify level	Panel Members
11:00 - 11:10	Break	
12:30 - 1:30	Lunch	Galaxy
1:30 - 2:30	Validation Continues	Panel Members
2:30 - 2:40	Break	
2:40 - 3:30	Validation Continues	Panel Members
3:30	Adjourn	

Tom Benton	Michigan Department of Education Marketing Consultant
Dr. Carl Woloszyk	Western Michigan University Associate Professor
Sharon Pickens	Michigan Department of Education Recorder
Dave Nesman	Meijer's
Frances Mitchell-Ware	Kroger's
Shawn Hearn	K-Mart's
Joel TePastt	Sysco/Frost-Pack
John Stevenson	Air Flite
Dee Smith	SMEI (Sales and Marketing Executives Int'l)
John Jorgenson	Marriott
Stephanie Giguere	Bill Knapp's
Judy Truman	First of America
Gladys Solokis	7-Eleven
Bruce Taylor	Taylor Lumber

Appendix C

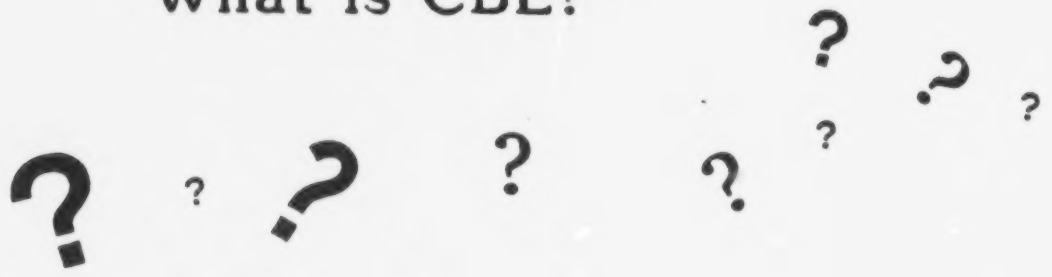
Name_____ Today's Date_____

Directions: You are to circulate among the members of this group and try to meet as many people as possible by having a different person sign or print their name legibly (a person can sign their name only once on each paper) by one of the following statements:

Find someone who...

	Name of person
1. likes doing jigsaw puzzles	
2. can dance the tango	
3. can recite the alphabet in under 10 secs.	
4. owns a pet with four legs	
5. has 3 or more three sisters	
6. has 2 or more children	
7. drove more than 75 miles to get here	
8. knows what DECA is	
9. owns a floral shop	
10. works for a hotel chain	
11. pronounces these Michigan cities correctly: Sault Ste. Marie, Charlotte, Ishpeming, Sebewaing, Grand Marais	
12. owns their own business	
13. drove less than 25 miles to get here	
14. collects something	
15. can hum the tune of "Yankee Doodle"	
16. knows what co-op education is	
17. works for a quick-serve restaurant chain	
18. can speak a foreign language	
19. flies their own plane	
20. sells auto parts	
21. belongs to a professional association	
22. volunteers for a charitable activity	
23. is an independent business owner	
24. plays a musical instrument	
25. whose name (first and last) has more than 10 letters	
26. reads the daily paper	
27. likes prime rib dinners	
28. usually sings in the shower	

What is CBE?



... a classroom management system which permits description in advance of the knowledges, skills, and attitudes that a student should possess upon exit from a program or course.

CHARACTERISTICS OF CBVE

1. COURSE CONTENT BASED ON WORKER TASKS

2. PERFORMANCE OBJECTIVES KNOWN IN ADVANCE

3. STUDENT ACHIEVEMENT BASED ON DEMONSTRATED COMPETENCY

4. INSTRUCTION IS INDIVIDUALIZED

5. MORE ACCOUNTABILITY (STUDENT AND TEACHER)

6. LEARNING GUIDED BY FEEDBACK

7. LEARNING TIME IS FLEXIBLE

8. OPEN ENTRY/OPEN EXIT PROGRAM IS POSSIBLE

9. CRITERIA-REFERENCED MEASUREMENT IS USED

10. TEACHER IS A MANAGER

COMPARISON BETWEEN TRADITIONAL AND COMPETENCY-BASED EDUCATION

TRADITIONAL EDUCATION	COMPETENCY-BASED EDUCATION
Determination is made about what the student is to learn.	Determination is made about what the student is to learn, under what conditions will it be learned, and what behavior determines when it is learned.
Instructional delivery system is group-centered.	Instruction may be individualized or group-centered.
Time for learning is constant, learning is variable.	Learning is constant, time may be variable.
Students are competitive with each other.	Learning environment is not competitive.
Level of achievement for given grade is not known prior to testing.	Criteria for achievement are determined prior to instruction.
Does not necessarily permit mastery level of learning for all students.	Permits mastery level of learning for all students.
Students are often not aware of what is to be learned and how to learn it.	Students are aware in advance of instruction, what is to be learned and how it can be learned.
Evaluation is based upon content taught.	Evaluation is referenced to learning objectives.
Testing is usually of the pencil-paper type.	Testing may be performance-oriented or may be pencil-paper type.
Student assessment procedures are rather standardized and periodic.	Student assessement procedures are more extensive.
A detailed systematic planning process often does not take place prior to instruction.	A more detailed systematic process which should lead to more effective instruction and hence student success is implied.

THE PROGRAM DEVELOPMENT PROCESS: A HANDBOOK. PREPARED BY ROBERT D. STEELY FOR COMMUNITY COLLEGE SERVICES, HIGHER EDUCATION MANAGEMENT SERVICES, MICHIGAN DEPARTMENT OF EDUCATION PROJECT NO. 33C0 - 9152-43.

MarkED's Research Process

STEP 1: Literature Review

STEP 2: Management Panel

STEP 3: Cluster Panel

STEP 4: Analysis and Synthesis

STEP 5: Validation Panels

* CONDUCTED IN SEVERAL GEOGRAPHIC LOCATIONS
* VALIDATE TASK LISTS
* SEQUENCE TASK STATEMENTS
* IDENTIFY LEVEL OF TASK

STEP 6: Data Base Management

General Marketing

Validation Panel

Marketing skills (concepts and job tasks)

required for marketing occupations

that require less than a B.A. degree

Skills would be across many marketing areas:

They would be common to the following:

Apparel, Food Marketing, Hospitality, Restaurant, Vehicle

and include Retailing, Service, Wholesale, Small Business

WORK DRAFT
For discussion purposes only

JOB TITLES DESCRIPTIONS

OWNER

Operates own business either alone or in partnership. Has final authority over purchasing, scheduling, promotions and operations.

BUYER

Has full authority to purchase merchandise for resale. Stays abreast of current trends. Attends buying shows, oversees purchasing and handling of merchandise. Is held accountable of overages and shortages of merchandise.

ASSISTANT BUYER

Assists in purchasing goods to be re-sold. Helps choose and order goods from manufacturers or wholesalers. Determines price of goods.

MANAGER

Maintains work force by hiring, training, and firing employees. Schedules employees, oversees purchasing budget, promotions, and receipt of goods. Maintains business operations records.

DEPARTMENT MANAGER

Maintains a specific departmental area within a larger store. Oversees display of department merchandise, scheduling and promotions within the department.

SALESPERSON

Greets customer, demonstrates product using feature benefit selling. Suggests accessories and or substitute products, writes sales slips, packages and wraps purchases

CASHIER

Tallies cost of goods bought using cash register terminal. Checks prices and price changes. Collects money and makes change. Packages merchandise. May also stock shelves weigh and package goods.

STOCK CLERK

Keeps merchandise in order on selling floor and in stockroom. Moves merchandise to selling floor when needed. Maintains and checks stock records.

WORK DRAFT
For discussion purposes only

SPECIALIZED OCCUPATIONAL AREA DESCRIPTIONS

SMALL BUSINESS OWNER

This area emphasizes the operation of ones own business either alone or in partnership. Anyone operating their own small business has final authority over purchasing, scheduling, promotions and operations.

APPAREL AND ACCESSORIES MARKETING

A career in the apparel and accessories marketing field centers around the fashions and trends of a society. Emphasis may be on mens, womens, childrens clothing; or any combination. Employment may be in a clothing store itself, at the point of production, or at the point of purchasing for resale.

FOOD MARKETING

An emphasis in this area would detail the marketing of food through grocery and convenience store operations. Individuals could gain employment in the store itself or be involved in the distribution centers which provide the merchandise offered for sale in the gorcery or convenience store operation.

RESTAURANT MARKETING

Employment in restaurant marketing centers around providing food service to customers. This can be done through formal dining room service or through quick serve restaurant service.

FINANCE AND CREDIT MARKETING

Finance and credit marketing involves operations that center around money matters. These are businesses such as banks, savings and loan companies, lending institutions, and brokerage firms. Employment in this area would mean giving financial advice, investing money, lending money, and protecting valuables. Services are offered to individuals as well as businesses.

HOSPITALITY AND TOURISM MARKETING

Hospitality and tourism marketing is a service based industry providing to customers the services of travel information and lodging. Employment in this area of marketing could include positions in small and large hotel or motel operations as well as positions in travel agencies.

WORK DRAFT
For discussion purposes only

VEHICLE AND PETROLEUM MARKETING

Vehicle and Petroleum marketing involves the production, distribution, and selling of vehicle and petroleum products and services. Employment in this field would encompass positions in auto parts businesses, gasoline stations, and auto repair businesses.

GENERAL MERCHANDISE/RETAILING

The field of General Merchandise/Retailing centers around marketing tasks to guide the retail operation and to facilitate the sale of a product or service to customers. Employment in this field could range from small to large department store operations.

Representative Job Titles:

Advertising and Display Services Series: display assistant, advertising assistant, copywriter, layout person, window trimmer, media salesperson, advertising solicitor

Apparel and Accessories Marketing Series, Master Employee Level: salesperson, counterperson, customer service clerk, cashier, stockperson, display assistant, receiving clerk

Apparel and Accessories Marketing Series, Supervisory Level: assistant department manager, assistant buyer, special events director, training manager, assistant fashion coordinator

Finance and Credit Services Series: teller, credit clerk, sales deposit clerk, telephone collector, credit interviewer

Food Marketing Series, Master Employee Level: cashier, product clerk, stock clerk, bagger, bakery clerk, receiving clerk

Food Marketing Series, Supervisory Level: assistant store manager, front end supervisor, assistant department manager, head cashier, manager trainee

General Marketing Series, Master Employee Level: salesperson, customer service clerk

General Marketing Series, Supervisory Level: section manager, department manager, sales manager, customer service manager

General Merchandise Retailing Series, Master Employee Level: salesperson, demonstrator, cashier, stock clerk, receiving clerk, shipping clerk, marking clerk

General Merchandise Retailing Series, Supervisory Level: section manager, floor supervisor, stock supervisor, assistant department manager, customer service manager, manager trainee

Quick Serve Restaurant Management Series: counter crew, counter supervisor, assistant manager

Full Service Restaurant Management Series: cashier, waiter/waitress, assistant manager

Vehicles and Petroleum Marketing Series: salesperson, counter clerk, station attendant, shift manager

Hospitality and Tourism Marketing Series: registration clerk, registration manager

DECA®

Developing Future Leaders for Marketing and Management

FOUNDATIONS

- **Economic**
  (EC)
- **Marketing and Business**
  (MB, MN, OP)
- **Human Resource**
  (MA, CO, HR, CD, MN)

– IDECC INSTRUCTIONAL AREAS –

EC – Economics
MB – Marketing and Business
MN – Management
OP – Operations
MA – Mathematics
CO – Communications
HR – Human Relations
CD – Career Development

Curriculum Committee
9-85

FUNCTIONS

Distribution

Financing

Marketing-information Management

Pricing

Product/Service Planning

Promotion

Purchasing

Risk Management

Selling

LEVELS OF EMPLOYMENT IN MARKETING

Employment in marketing can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. The occupational requirements for each level of employment guide the identification of instructional objectives and learning activities. The marketing activities which take place at each level of employment can still be classified in the broad categories of marketing functions, but the activities vary in complexity from level to level. Prebaccalaureate marketing education is directed to instruction at the first five levels of marketing employment.

Entry-level marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing education, experience, or commitment to a marketing career. Competencies required to secure and hold such a job address good personal appearance, general business behavior, and basic skills such as math and communications.

Career-sustaining level marketing occupations involve performing more complex duties, using routine decision-making skills, and limited control of one's own working environment. Individuals in a career-sustaining level job should have a basic understanding of the marketing concept and its foundations and have indicated an initial interest in marketing as a potential career.

Marketing Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function. Individuals in a marketing specialist occupation need to have a thorough understanding of the marketing concept and its functions.

Marketing Supervisor involves a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating, and supervising people. They may also be involved in the planning, coordinating, and supervising of marketing-related activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning one's own business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a unit within an organization or of a small business enterprise. A comprehensive understanding of marketing and management competencies is required to function in this role.

There are higher levels of employment in marketing which involve the preparation of individuals for top-level positions such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience and thorough comprehension of the theories of marketing and their application to corporate activity.

Occupational/Curriculum Levels

Entry-level

Career-sustaining

Marketing Specialist

Marketing Supervisor

Manager-Entrepreneur

FOUNDATIONS FOR MARKETING

Economic Foundations of Marketing	Levels:
Explain the concept of economic goods and services	1 2 3 4 5
Explain the concept of economic resources	1 2 3 4 5
Explain the concept of economics and economic activities	1 2 3 4 5
Explain the concept of utility	1 2 3 4 5
Explain the concept of supply and demand	1 2 3 4 5
Explain the concept of price	1 2 3 4 5
Explain the types of economic systems	1 2 3 4 5
Explain the relationship of government and business	1 2 3 4 5
Explain the concept of private enterprise	1 2 3 4 5
Explain the concept of profit	1 2 3 4 5
Explain the concept of risk	1 2 3 4 5
Explain the concept of competition	1 2 3 4 5
Explain the concept of productivity	1 2 3 4 5
Explain the concept of specialization/division of labor	1 2 3 4 5
Explain the concept of organized labor and business	1 2 3 4 5
Explain the concept of gross national product	1 2 3 4 5
Explain the concept of business cycles	1 2 3 4 5
Explain the nature of international trade	1 2 3 4 5

General Marketing Master 2

Human Resource Foundations (Mathematics)

Solve addition problems	1 2 3 4 5
Solve subtraction problems	1 2 3 4 5
Solve multiplication problems	1 2 3 4 5
Solve division problems	1 2 3 4 5
Solve mathematical problems involving fractions	1 2 3 4 5
Solve mathematical problems involving percentages	1 2 3 4 5
Read charts and graphs	1 2 3 4 5
Solve first-degree algebraic equations	1 2 3 4 5
Calculate tax, discounts, and miscellaneous charges for purchases	1 2 3 4 5
Calculate net sales	1 2 3 4 5
Interpret profit and loss statements	1 2 3 4 5

Human Resource Foundations (Communications)	Levels:
Explain the nature of effective communications	1 2 3 4 5
Use proper grammar and vocabulary	1 2 3 4 5
Explain the nature of effective verbal communications	1 2 3 4 5
Address people properly	1 2 3 4 5
Use telephone in businesslike manner	1 2 3 4 5
Explain the nature of written communications	1 2 3 4 5
Write business letters	1 2 3 4 5
Prepare simple written reports	1 2 3 4 5
Prepare complex written reports	1 2 3 4 5
Listen to and follow directions	1 2 3 4 5
Explain the nature of staff communications	1 2 3 4 5
Explain the use of inter-departmental/company communications	1 2 3 4 5
Explain the use of employee publications	1 2 3 4 5
Give directions for completing job tasks	1 2 3 4 5
Conduct staff meetings	1 2 3 4 5

Human Resource Foundations (Human Relations)

Develop personality traits important to business	1 2 3 4 5
Maintain appropriate personal appearance	1 2 3 4 5
Maintain positive attitude	1 2 3 4 5
Demonstrate interest and enthusiasm	1 2 3 4 5
Demonstrate responsible behavior	1 2 3 4 5
Demonstrate honesty and integrity	1 2 3 4 5
Demonstrate ethical behavior	1 2 3 4 5
Demonstrate orderly and systematic behavior	1 2 3 4 5
Demonstrate initiative	1 2 3 4 5
Demonstrate self-control	1 2 3 4 5
Demonstrate appropriate creativity	1 2 3 4 5
Explain the concept of self-understanding	1 2 3 4 5
Explain the concept of self-esteem	1 2 3 4 5
Use feedback for personal growth	1 2 3 4 5
Adjust to change	1 2 3 4 5
Set personal goals	1 2 3 4 5
Use time-management principles	1 2 3 4 5
Foster positive working relationships	1 2 3 4 5
Explain the nature of positive customer/client relations	1 2 3 4 5
Handle customer inquiries	1 2 3 4 5
Direct customer/client to other locations	1 2 3 4 5
Explain management's role in customer relations	1 2 3 4 5
Show empathy for others	1 2 3 4 5
Use appropriate assertiveness	1 2 3 4 5
Handle difficult customers	1 2 3 4 5
Interpret business policies to customers/clients	1 2 3 4 5
Handle customer/client complaints	1 2 3 4 5

Human Resource Foundations (Career Development)

Conduct a job search	1 2 3 4 5
Prepare a resume	1 2 3 4 5
Write a letter of application	1 2 3 4 5
Complete a job application	1 2 3 4 5
Interview for a job	1 2 3 4 5
Explain the use of trade journals/periodicals	1 2 3 4 5
Explain the role of professional/trade organizations	1 2 3 4 5
Explain the nature of trade shows	1 2 3 4 5
Explain the role of dealer/franchise meetings	1 2 3 4 5

Human Resource Foundations (Management)	Levels:
Plan and organize work	1 2 3 4 5
Schedule employees	1 2 3 4 5
Maintain personnel records	1 2 3 4 5
Calculate personnel turnover rate	1 2 3 4 5
Develop a personnel organizational plan	1 2 3 4 5
Develop job classifications	1 2 3 4 5
Determine hiring needs	1 2 3 4 5
Establish personnel policies	1 2 3 4 5
Explain ways to develop a positive working environment	1 2 3 4 5
Explain ways to build employee morale	1 2 3 4 5
Explain the concept of staff motivation	1 2 3 4 5
Explain the relationship of communications with employee motivation	1 2 3 4 5
Explain the concept of employee participation in decision making	1 2 3 4 5
Explain the role of leadership in business	1 2 3 4 5
Handle employee complaints and grievances	1 2 3 4 5
Use evaluation data for staffing decisions	1 2 3 4 5
Explain techniques for recruiting new employees	1 2 3 4 5
Explain techniques for recruiting management personnel	1 2 3 4 5
Interview job applicants	1 2 3 4 5
Select new employees	1 2 3 4 5
Orient new employees	1 2 3 4 5
Orient new employees (management's role)	1 2 3 4 5
Explain the role of training and human resource development	1 2 3 4 5
Explain the nature of management/supervisory training	1 2 3 4 5
Conduct training class/program	1 2 3 4 5
Evaluate employees	1 2 3 4 5
Explain the nature of remedial action	1 2 3 4 5
Explain the nature of wage and benefit programs	1 2 3 4 5
Develop employee incentive program	1 2 3 4 5

Marketing and Business Fundamentals

Explain the functions of business	1 2 3 4 5
Explain marketing and its importance	1 2 3 4 5
Explain the concept of management	1 2 3 4 5
Explain the concept of production	1 2 3 4 5
Explain the concept of accounting/finance	1 2 3 4 5
Explain the concept of administration	1 2 3 4 5
Explain the relationship of business and society	1 2 3 4 5
Explain the types of business ownership	1 2 3 4 5
Explain marketing functions and related activities	1 2 3 4 5
Explain the concept of marketing strategies	1 2 3 4 5
Explain the concept of market and market identification	1 2 3 4 5
Explain the nature of channels of distribution	1 2 3 4 5

General Marketing Master

Marketing and Business Fundamentals (Management)

	Levels:
Explain the nature of overhead/operating costs	1 2 3 4 5
Explain employee role in expense control	1 2 3 4 5
Develop expense-control plans	1 2 3 4 5
Explain the nature of operating budgets	1 2 3 4 5
Develop sales-support budget	1 2 3 4 5
Develop company-wide budget	1 2 3 4 5
Use budgets to control operations	1 2 3 4 5
Analyze operating results in relation to budget/industry	1 2 3 4 5
Develop company objectives (for mgt. unit)	1 2 3 4 5
Explain external planning considerations	1 2 3 4 5
Explain legal considerations for company operation	1 2 3 4 5
Explain types of records needed for business operations	1 2 3 4 5
Establish operating policies	1 2 3 4 5

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Marketing and Business Fundamentals (Operations)

Explain the nature and scope of operations	1 2 3 4 5
Handle company equipment properly	1 2 3 4 5
Operate calculator	1 2 3 4 5
Explain functions of store maintenance	1 2 3 4 5

MARKETING FUNCTIONS AND APPLICATIONS

Distribution

	Levels:
Explain the nature and scope of distribution	1 2 3 4 5
Explain the receiving process	1 2 3 4 5
Explain storing considerations	1 2 3 4 5
Select appropriate storage equipment	1 2 3 4 5
Organize stock counts	1 2 3 4 5
Explain the nature of inventory control systems	1 2 3 4 5
Explain types of unit inventory control systems	1 2 3 4 5
Calculate inventory shrinkage	1 2 3 4 5
Maintain unit inventory control systems	1 2 3 4 5
Explain the nature of dollar inventory control systems	1 2 3 4 5
Maintain dollar inventory control systems	1 2 3 4 5
Explain the nature of channel strategies	1 2 3 4 5
Select appropriate channels	1 2 3 4 5

Financing

Explain the nature and scope of financing	1 2 3 4 5
Explain the purposes and importance of credit	1 2 3 4 5
Facilitate credit applications	1 2 3 4 5
Facilitate business credit applications	1 2 3 4 5
Explain the purpose and importance of obtaining credit (business)	1 2 3 4 5

Marketing-Information Management

Explain the nature and scope of marketing-information management	1 2 3 4 5
Explain the nature of marketing-research (what it is, process, ir	1 2 3 4 5
Select sources of information (primary vs. secondary, defined, sc reasons for selecting one)	1 2 3 4 5
Select research method for gathering data (survey, experimental, personal interview, observational, ...)	1 2 3 4 5
Develop simple questionnaire	1 2 3 4 5
Prepare sampling plan (sampling unit, size, procedure)	1 2 3 4 5
Explain the nature of demand analysis	1 2 3 4 5
Explain the nature of sales forecasts	1 2 3 4 5
Interpret trends in sales volume	1 2 3 4 5
Interpret market demand	1 2 3 4 5
Determine sales potential	1 2 3 4 5
Interpret factors affecting market share	1 2 3 4 5
Forecast sales	1 2 3 4 5
Develop marketing plan	1 2 3 4 5

Pricing

Explain the nature and scope of pricing	1 2 3 4 5
Explain factors affecting selling price	1 2 3 4 5
Explain the psychological effects of pricing	1 2 3 4 5
Calculate break-even points	1 2 3 4 5
Explain the nature of company pricing policies/strategies	1 2 3 4 5
Explain legal considerations of pricing	1 2 3 4 5
Establish selling price (mgt.)	1 2 3 4 5
Adjust prices	1 2 3 4 5

General Marketing Master

Product/Service Planning

Explain the nature and scope of product/service planning	1 2 3 4 5
Explain the nature of product-life cycles	1 2 3 4 5
Explain critical aspects of business image	1 2 3 4 5
Explain applicable grades and standards	1 2 3 4 5
Explain warranties and guarantees	1 2 3 4 5
Explain the role of branding	1 2 3 4 5
Explain consumer protection provisions of appropriate agencies	1 2 3 4 5
Explain the nature of the product-development process	1 2 3 4 5
Explain the nature of product positioning	1 2 3 4 5
Explain the nature of packaging	1 2 3 4 5
Explain the concept of product mix	1 2 3 4 5
Plan product mix	1 2 3 4 5
Explain the role of special customer services	1 2 3 4 5

Promotion	Levels:
Explain the role of promotion	1 2 3 4 5
Explain the types of promotion	1 2 3 4 5
Explain the concept of promotional mix	1 2 3 4 5
Explain the types of media	1 2 3 4 5
Calculate media costs	1 2 3 4 5
Select promotional media	1 2 3 4 5
Contract for print advertising	1 2 3 4 5
Contract for broadcast advertising	1 2 3 4 5
Evaluate media/advertising effectiveness	1 2 3 4 5
Promote through publicity	1 2 3 4 5
Explain the nature of company participation in community activities	1 2 3 4 5
Write news release	1 2 3 4 5
Plan use of specialty advertising, premiums, etc.	1 2 3 4 5
Explain the use of catalogs as a promotional tool	1 2 3 4 5
Explain the nature of a promotional program	1 2 3 4 5
Select products for promotion	1 2 3 4 5
Use past advertisements for promotional planning	1 2 3 4 5
Coordinate promotional activities	1 2 3 4 5
Coordinate promotional and selling activities	1 2 3 4 5
Develop a comprehensive, company-wide promotional program	1 2 3 4 5
Prepare promotional budget	1 2 3 4 5
Prepare advertising budget	1 2 3 4 5
Seek cooperative advertising/promotional materials	1 2 3 4 5
Use advertising agency	1 2 3 4 5
Explain the use of advertising agencies	1 2 3 4 5
Determine promotional policy/strategy	1 2 3 4 5

Purchasing

	Levels:
Explain the nature and scope of purchasing	1 2 3 4 5
Explain company buying/purchasing policies	1 2 3 4 5
Explain the nature of buying process	1 2 3 4 5
Determine what to buy	1 2 3 4 5
Determine quantities to buy	1 2 3 4 5
Determine when to buy	1 2 3 4 5
Explain the nature of buyer reputation/vendor relationships	1 2 3 4 5
Choose vendors/resources	1 2 3 4 5
Negotiate purchasing contract	1 2 3 4 5
Analyze/Select appropriate products	1 2 3 4 5
Calculate merchandising-related discounts	1 2 3 4 5
Determine final cost of product to company	1 2 3 4 5
Order merchandise	1 2 3 4 5
Schedule regular product deliveries	1 2 3 4 5
Authorize payments for merchandise	1 2 3 4 5
Analyze proposed purchases	1 2 3 4 5
Explain the nature of purchasing budgets	1 2 3 4 5
Plan stock	1 2 3 4 5
Plan reductions	1 2 3 4 5
Plan purchases	1 2 3 4 5
Plan gross margin	1 2 3 4 5
Prepare/Review purchasing budgets	1 2 3 4 5

Risk Management

Explain the types of risk	1 2 3 4 5
Explain the nature of risk management	1 2 3 4 5
Explain routine security precautions	1 2 3 4 5
Use fire and safety equipment	1 2 3 4 5
Complete emergency planning	1 2 3 4 5
Use safety precautions	1 2 3 4 5
Explain procedures for handling accidents	1 2 3 4 5

Selling	Levels:
Explain the purpose and importance of selling	1 2 3 4 5
Explain company selling policies	1 2 3 4 5
Address needs of individual personalities	1 2 3 4 5
Use buying motives as basis of sales presentation	1 2 3 4 5
Facilitate customer buying decisions	1 2 3 4 5
Explain key factors in building a clientele	1 2 3 4 5
Explain the selling process	1 2 3 4 5
Open the sales presentation	1 2 3 4 5
Question/Probe for information	1 2 3 4 5
Question/Probe for information (advanced)	1 2 3 4 5
Suggest product substitution	1 2 3 4 5
Demonstrate product	1 2 3 4 5
Use feature/benefit selling	1 2 3 4 5
Handle customer/client objections	1 2 3 4 5
Close the sale	1 2 3 4 5
Use suggestion selling	1 2 3 4 5
Sell product/service	1 2 3 4 5
Explain follow-up techniques	1 2 3 4 5
Maintain/Use customer/prospect list	1 2 3 4 5
Obtain product information from sources on/with the item	1 2 3 4 5
Use company promotional material for selling information	1 2 3 4 5
Explain services and terms being advertised by competitors	1 2 3 4 5
Obtain product information from appropriate individuals	1 2 3 4 5
Obtain product information from appropriate individuals (management)	1 2 3 4 5
Process telephone orders	1 2 3 4 5
Explain sales quotas	1 2 3 4 5
Prepare sales report	1 2 3 4 5
Explain the nature of telemarketing	1 2 3 4 5
Organize sales territories	1 2 3 4 5
Explain the nature of sales training	1 2 3 4 5
Develop sales-incentive programs	1 2 3 4 5

GENERAL MARKETING VALIDATION PANEL

MINUTES

The General Marketing Validation Panel meeting was held on Wednesday, September 5, 1990 at Michigan State University, Kellogg Center, Room 101. The meeting began at 9:30 a.m. and ended at 3:45 p.m.

Attendees:

John Jorgenson	Marriott Hotels
Shawn Hearn	K-Marts
Vivieen Burke	Kroger Company
Gladys Solokis	7-Eleven
Joel TePastt	Sysco/Frost-Pack
Dave Nesman	Meijer's
Stephanie Giguere	Bill Knapp's
Dee Smith	SMEI (Sales and Marketing Executives International/Lansing Community College
John Stevenson	Air Flite

Others:

Dr. Carl Woloszyk	Western Michigan University
Tom Benton	Michigan Department of Education
Sharon Pickens	Michigan Department of Education

Refreshments were served from 9:00-9:30.

Panel Members and sponsors introduced themselves at 9:30.

A brief synopsis of the Marketing Education framework and representative titles relating to general marketing were presented to each panel member. Mr. Benton instructed the participants as to the importance of this panel. The results of this panel will help prepare students for gainful employment and employment advancement.

Dr. Woloszyk reviewed Competency Based Education; topic covered included:

1. Course content based on worker tasks
2. Performance objectives known in advance
3. Student achievement based on demonstrated competency
4. Instruction is individualized
5. More accountability (student and teacher)
6. Learning guided by feedback
7. Learning time is flexible
8. Open Entry/Open Exit program is possible
9. Criteria-referenced measurement is used
10. Teacher is a manager

Panel members were instructed to base their assessments on marketing skills (concepts and job tasks) required for marketing occupations that requires less than a bachelors degree.

Mr. Benton reviewed MarkED's research process, and focused on step 5:

Step 1. Literature Review
2. Management Panel
3. Cluster Panel
4. Analysis and Synthesis
5. Validation Panel
   a. Conducted in several geographic locations
   b. Validate task lists
   c. Sequence task statements
   d. Identify level of task
6. Data Base Management

Mr. Benton also reviewed the Operational Guidelines:

a. Modified Brainstorming procedures
b. Equal participation by all members
c. Free sharing of ideas
d. Consideration of all statements
e. Participation of observes not permitted
f. Use of references not permitted
g. Constructive statements permitted
h. Constructive statements permitted

The panel reviewed five levels of marketing occupations and then listed representative job titles:

1. Entry Level

routine activities
limited decision-making
no experience necessary
good personal appearance
general business behavior
basic math and communications skills

Job Titles:

Customer Service representative, merchandising clerk, marketing assistant, clerk, telemarketers, cashier, bagger, marker, order-taker/writer, reservationist, server, busser.

2. Career-Sustaining

routine decision making
limited control of working environment
interest in marketing as a career
basic understanding of marketing concept

Job Titles:

cashier
head cashier
sales person
sales representative,
lead clerk
crew leader
customer service representative,
stockperson.

3. Marketing Specialist

frequent use of decision making/leadership skills:

Job Titles:

mastery of marketing skills across functions
extensive knowledge of marketing skills
buyer assistant
merchandiser
professional sales
manufacturers representative
manager trainee
department head (supervisor)

4. Marketing Supervisor

high level of competence in decision-making and leadership
planning, coordinating, and supervising people
involved in marketing activities

Job Titles:

administrative support
department supervisor
assistant manager
sales manager (district manager)
customer service manager
marketing manager
merchandising manager
operations manager

5. Manager-Entrepreur

competency in owning own business or managing a department or store
fully responsible for success or failure
comprehensive understanding of marketing/management

Job Titles:

store manager
owner
merchandise manager
marketing manager
vice president marketing
director
vice president sales

The panel divided into three groups in order to review wording, add tasks, add or delete tasks, review sequence and identify by level.

Discussion:

1. Under Economic Foundations of Marketing, page 1: the word -"concept" should be changed to "importance"

2. Under Human Resource Foundations (Communications), page 3:
-Add: "Develop listening skills, Level 2"
-In #12, change "Explain" to "Read" in "Explain the use of inter-departmental/company communications"
-Eliminate #13, "Explain the use of employee publications"

3. Under Human Resource Foundations (Human Relations): page 4:
-change "the concept of self-understanding" to personal strengths and weaknesses"
-eliminate: "explain the concept of self-understanding"
-change "Handle difficult customers" to "Explain procedures/ options for handling difficult customers", Level 2

4. Under Human Resource Foundations (Management), Page 6:
-Add "Approve employee incentive program, Level 4
-Add "Approve remedial action", Level 4

5. -Under Marketing and Business Fundamentals (Operations) Page 9:
Change "Operate calculator" to "Operate Keyboard", Level 1

6. -Under "Financing", Page 11:
Add "personal, consumer/individual" to "Facilitate credit applications"

7. -Under "Pricing", Page 13:
Add "Establish Price", Level 4

8. -Under "Promotion", Page 15
Add "and approved" to "Determine promotional policy strategy

-"Write" news release, Level 3
-Add to list: "Approve" news release, Level 5

-Change #23 "Seek cooperative advertising/promotional materials" to "Identify promotional materials"

-Add "Approve" to #20: "Develop a comprehensive, company-wide promotional program", Level 5

-A "Department" statement is Level 4;
A "Division" statement is level 5

-Change "Contract" to "Purchase Order" in: #7 and 8:
"Contract for print advertising", and "Contract for broadcast advertising".

-Change "Use" to "Selecting" in #24: "Use advertising agency".

9. -Under "Purchasing",

-The heading "Purchasing" should be changed to "Purchasing/buying"
-Clarify "Ordering/buying"

-Change "buying/purchasing" to "Ordering", #2: "Explain company buying/purchasing policies"

-Change "Explain" to "Evaluate" in #7: "Explain the nature of buyer reputation/vendor relationships"

10. -Under Risk Management"

-"Nature" needs clarification in #2, "Explain the nature of risk management"

-#5 "Complete emergency planning" needs clarification; should read: "Develop emergency/planning procedures"

11. -Under "Selling"

-Add "Explain Listening Skills"
-Add "Organize Time Management (territories)"
-#23-24, redefine product information
-Change "individual personalities" to "client" in #3, "Address needs of individual personalities"
-Eliminate #17 "Sell product/service"

Mr. Benton and Dr. Woloszyk thanked the panel members for their help, stating the importance of the work that they had accomplished. Dr. Woloszyk also advised the members that they would be reimbursed for their mileage by filling out the proper forms, if they so desired.

The meeting adjourned at 3:45 p.m.

Appendix D

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Ms. Gladys Solokis
7-Eleven Food
510 South Court
Gaylord, Michigan 49735

Dear Ms. Solokis:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

Please review the individual pages for spelling and grammar. We have also tried to sequence the concepts and tasks by order of difficulty (easiest tasks to the more difficult). You should make any suggestions and/or changes on the individual sheets and return the sheets with suggestions in the enclosed envelope no later than October 5, 1990. Be sure to include your participation record, even if you do not have any suggested changes.

It is anticipated that the final research report will be available in November. When the final report is available, you will receive a copy. Thank you in advance for your help and assistance in providing meaningful input for the improvement of marketing education programs throughout the country.

Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. Joel R. TePastte
Senior Vice President
Sysco Frost-Pack Food Services, Inc.
3700 Sysco Court, Southeast
Post Office Box 8769
Grand Rapids, Michigan 49508

Dear Mr. TePastte:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. Dave Nesman
Employment Manager
Meijer, Incorporated
2727 Walker, Northwest
Grand Rapids, Michigan 49504

Dear Mr. Nesman:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. Bruce Taylor
Taylor Lumber
89 East Battle Creek Street
Galesburg, Michigan 49053

Dear Mr. Taylor:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. John Jorgenson
Livonia Mariott
17100 North Laurel Park Drive
Livonia, Michigan 48152

Dear Mr. Jorgenson:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Ms. Vivieen Burke
Kroger Company
4884 Marsh
Okemos, Michigan 48864

Dear Ms. Burke:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Ms. Stephanie Giguere
Educational Training Specialist
Bill Knapp's
110 Knapp Drive
Battle Creek, Michigan 49015

Dear Ms. Giguere:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. Dee Smith, Director
Lansing Community College
Post Office Box 40010
Lansing, Michigan 48901-7210

Dear Mr. Smith:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. John Stevenson
Air Flite Industries, Inc.
3707 East Grand Ledge Highway
Post Office Box Eight
Grand Ledge, Michigan 48837-0008

Dear Mr. Stevenson:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

September 21, 1990

Mr. Shawn Hearn
K-Mart's, N318
3100 West Big Beaver Road
Troy, Michigan 48084

Dear Mr. Hearn:

Enclosed please find a listing of the concepts and job tasks for General Marketing at the various levels of instruction, as determined by our validation panel at the September meeting. Tom Benton and I have edited the original master list, clarified several tasks and included additional tasks which were suggested by the panel.

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Sincerely,

Carl A. Woloszyk
Associate Professor
Project Director

Tom Benton, Consultant
Marketing Education
Michigan Department of Education

REPRESENTATIVE JOB TITLES

ENTRY LEVEL

Clerk
Marker
Server
Busser
Merchandise Clerk
Telemarketer
Cashier
Bagger
Order Taker
Reservationist
Customer Sevice Rep.
Marketing Assistant

CAREER SUSTAINING

Cashier
Head Cashier
Salesperson
Sales Representative
Lead Clerk
Crew Leader
Customer Service Rep.
Stockperson

MARKETING SPECIALISTS

Merchandiser
Assistant Buyer
Professional Sales
Manufacturers Rep.
Management Trainee
Department Head
Department Supervisor
Marketing Research Asst.

MARKETING SUPERVISOR

Department Supervisor
Assistant Manager
Department Manager
Sales Manager
District Manager
Customer Service
Marketing Manager
Merchandising Manager
Operations Manager

MANAGER/OWNER

Store Manager
Owner
Merchandise Manager
Marketing Manager
Vice President, Marketing
Director
Vice President, Sales

Participation Record

This form will indicate that I participated in a DACUM validation panel meeting on September 5, 1990 in East Lansing, Michigan for General Marketing occupations.

I have reviewed the concepts and job tasks which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

_____

Name of Panel member

_____

Name of Business/Organization

_____

Job title/position

Please return to:

Dr. Carl A. Woloszyk
Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

Participation Record

This form will indicate that I participated in a DACUM validation panel meeting on September 5, 1990 in East Lansing, Michigan for General Marketing occupations.

I have reviewed the concepts and job tasks which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

E. Bruce [illegible]
Name of Panel member

Taylor Lumber Co Inc
Name of Business/Organization

Owner/Operator
Job title/position

Please return to:

Dr. Carl A. Woloszyk
Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

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This form will indicate that I participated in a DACUM validation panel meeting on September 5, 1990 in East Lansing, Michigan for General Marketing occupations.

I have reviewed the concepts and job tasks which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

_____
Name of Panel member

_____
Name of Business/Organization

_____
Job title/position

Please return to:

Dr. Carl A. Woloszyk
Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

Participation Record

This form will indicate that I participated in a DACUM validation panel meeting on September 5, 1990 in East Lansing, Michigan for General Marketing occupations.

I have reviewed the concepts and job tasks which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

Gladys Sokris
Name of Panel member

J. Skeen Feet Store
Name of Business/Organization

Supervisor Shoe
Job title/position

Please return to:

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Associate Professor
Department of Consumer Resources
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SHAWN C HEARN

Name of Panel member

Kmart Corporation

Name of Business/Organization

Assistant Director Personnel and Training

Job title/position

Please return to:

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Associate Professor
Department of Consumer Resources
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Western Michigan University
Kalamazoo, Michigan 49008-3899

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Vivienne Burke
Name of Panel member

Kroger
Name of Business/Organization

Admin. Support
Job title/position

Please return to:

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Department of Consumer Resources
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Stephanie Giguere
Name of Panel member

Bill Knapp's, Inc
Name of Business/Organization

Education + Training Specialist
Job title/position

Please return to:

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Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

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panel members.

Dee Smith
Name of Panel member

Lansing Community College
Name of Business/Organization

Job title/position

Please return to:

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Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

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Joel TePastte
Name of Panel member

Sysco - Frost Pack
Name of Business/Organization

Senior Vice President
Job title/position

Please return to:

Dr. Carl A. Woloszyk
Associate Professor
Department of Consumer Resources
and Technology
Western Michigan University
Kalamazoo, Michigan 49008-3899

Appendix E

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5041
616 387-3700

WESTERN MICHIGAN UNIVERSITY

June 3, 1991

Ms. Beth Osteen
Vice-President, Research and Product Development
MarkED Resource Center
1375 King Avenue
P.O. Box 12226
Columbus, Ohio 43212-0226

Dear Beth:

During the 1990-91 school year, I performed a DACUM study for General Marketing Occupations. Subsequently, a team of writers from our state under the direction of Mr. Tom Benton, State Supervisor for Marketing Education completed a Marketing Education Cluster Guide.

I have enclosed the following information documenting the results of my research study and the work of the Michigan writers:

1. Membership and Minutes of the DACUM committee
2. DACUM task listing by level of employment
3. Marketing Education Cluster Guide (job titles on p. 16)
4. Participation records of DACUM panel members

As per earlier discussions, please credit the state of Michigan MarkED membership account with the appropriate research credit for our efforts. If any additional information is required, please feel free to contact me at work (616) 387-3721 or home (517) 627-5935. We hope that our work in Michigan will prove helpful to the MarkED consortium. See you in Seattle!

Sincerely,

Carl A. Woloszyk

Carl A. Woloszyk, Ph.D.
Associate Professor

c: Tom Benton, Michigan Department of Education